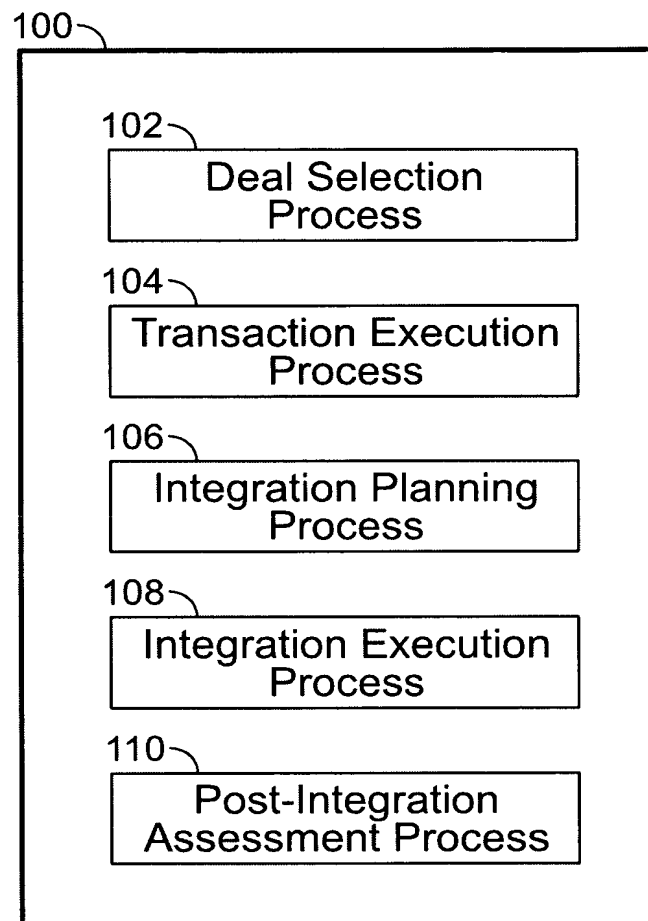


FIG. 1



**FIG. 2**

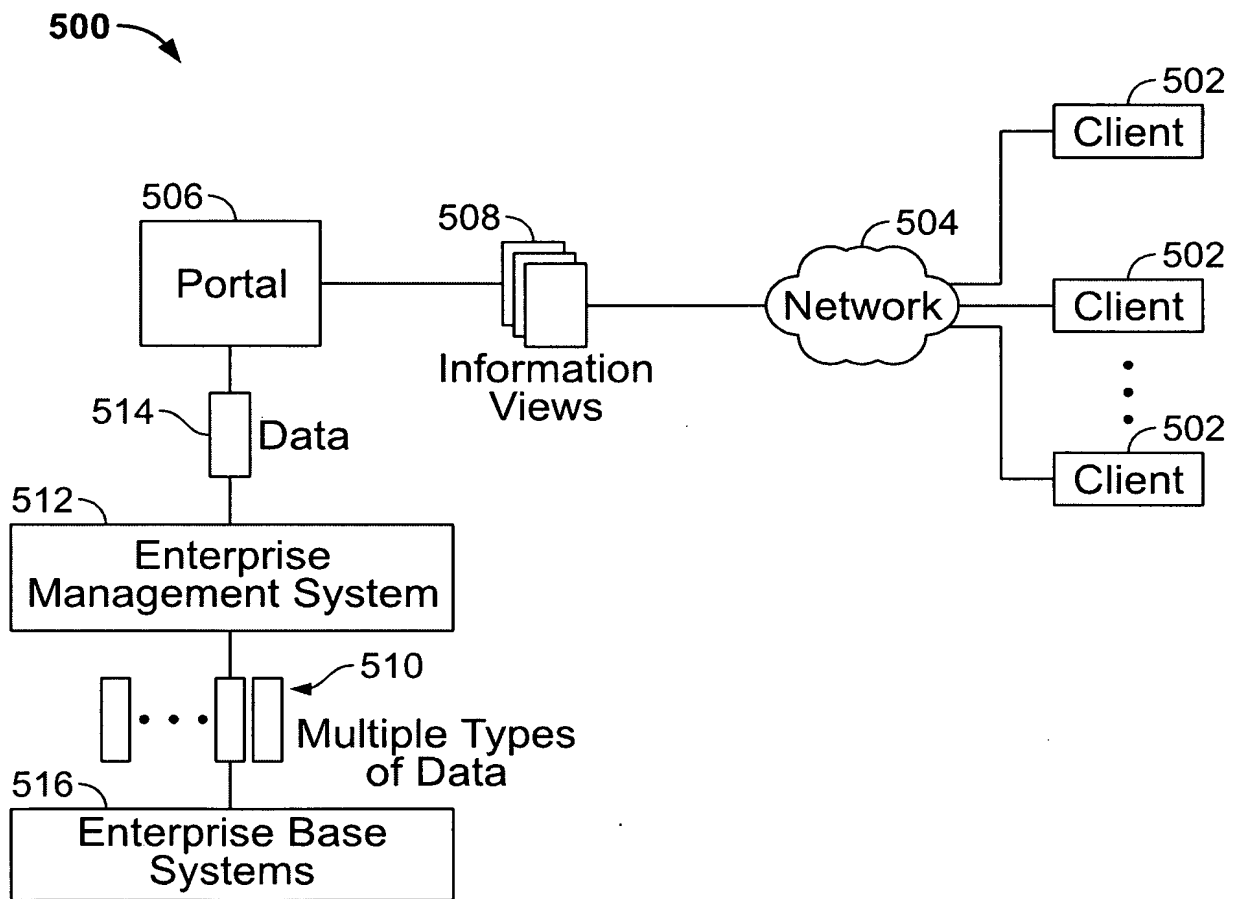


FIG. 3

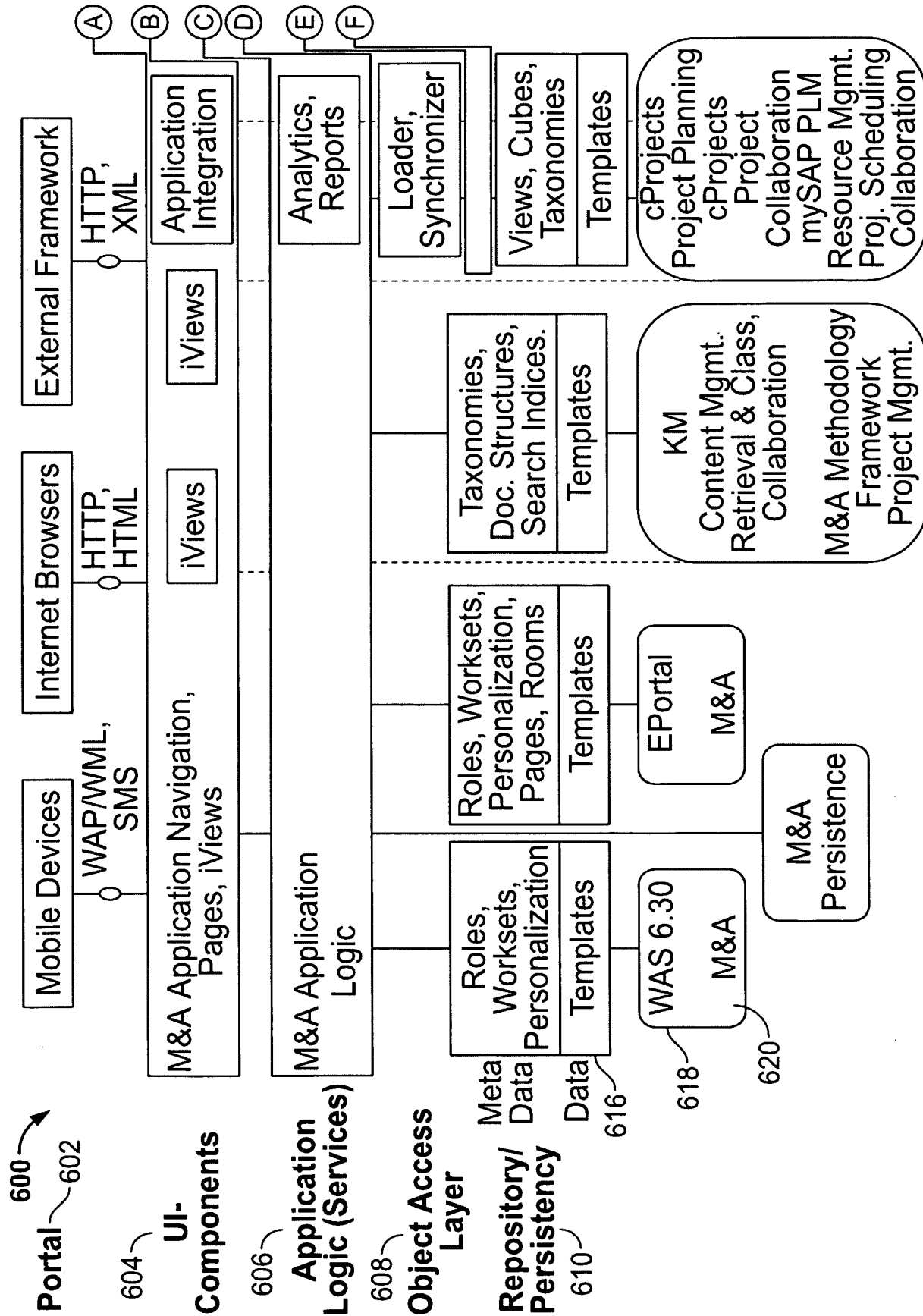
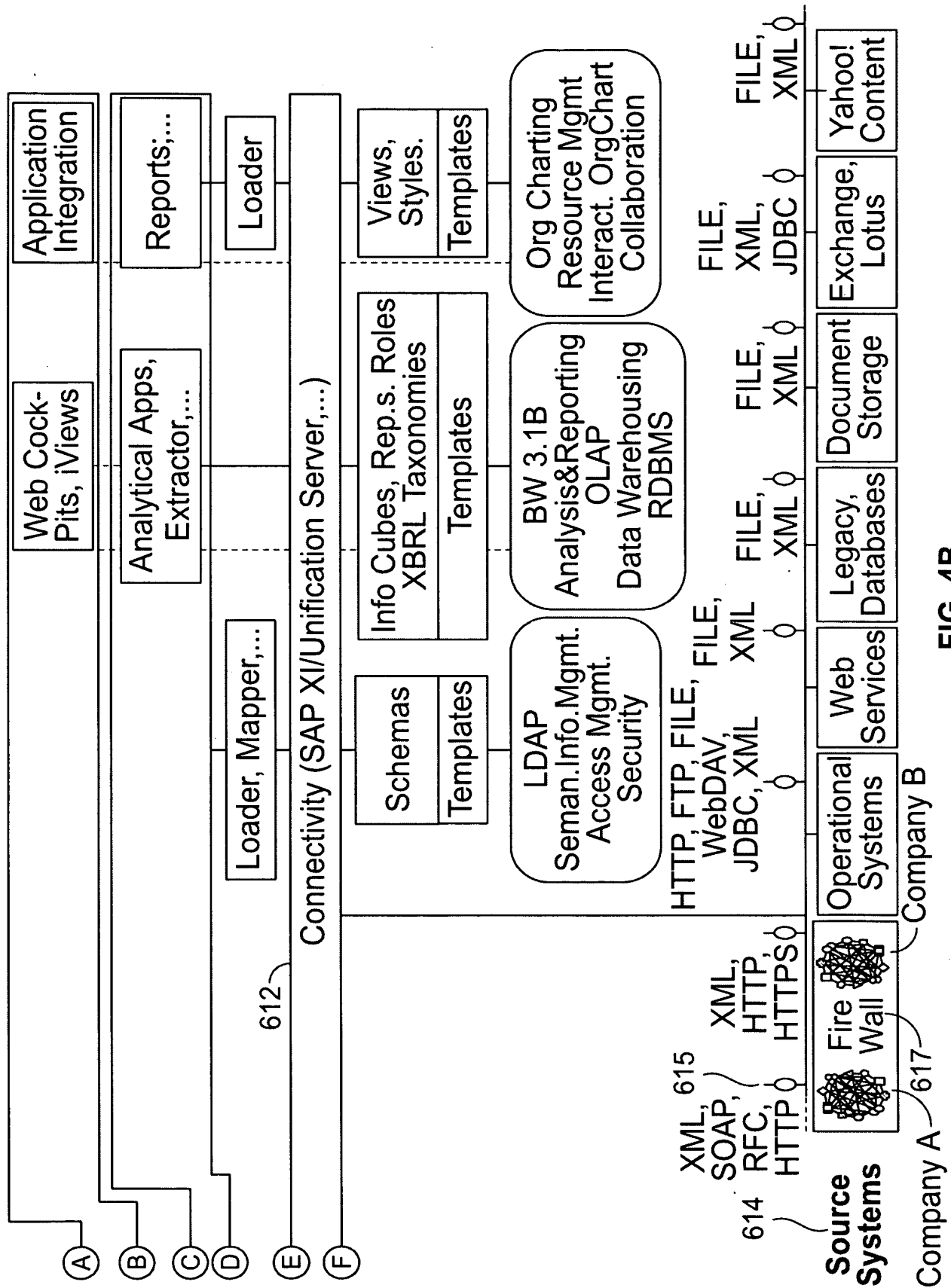
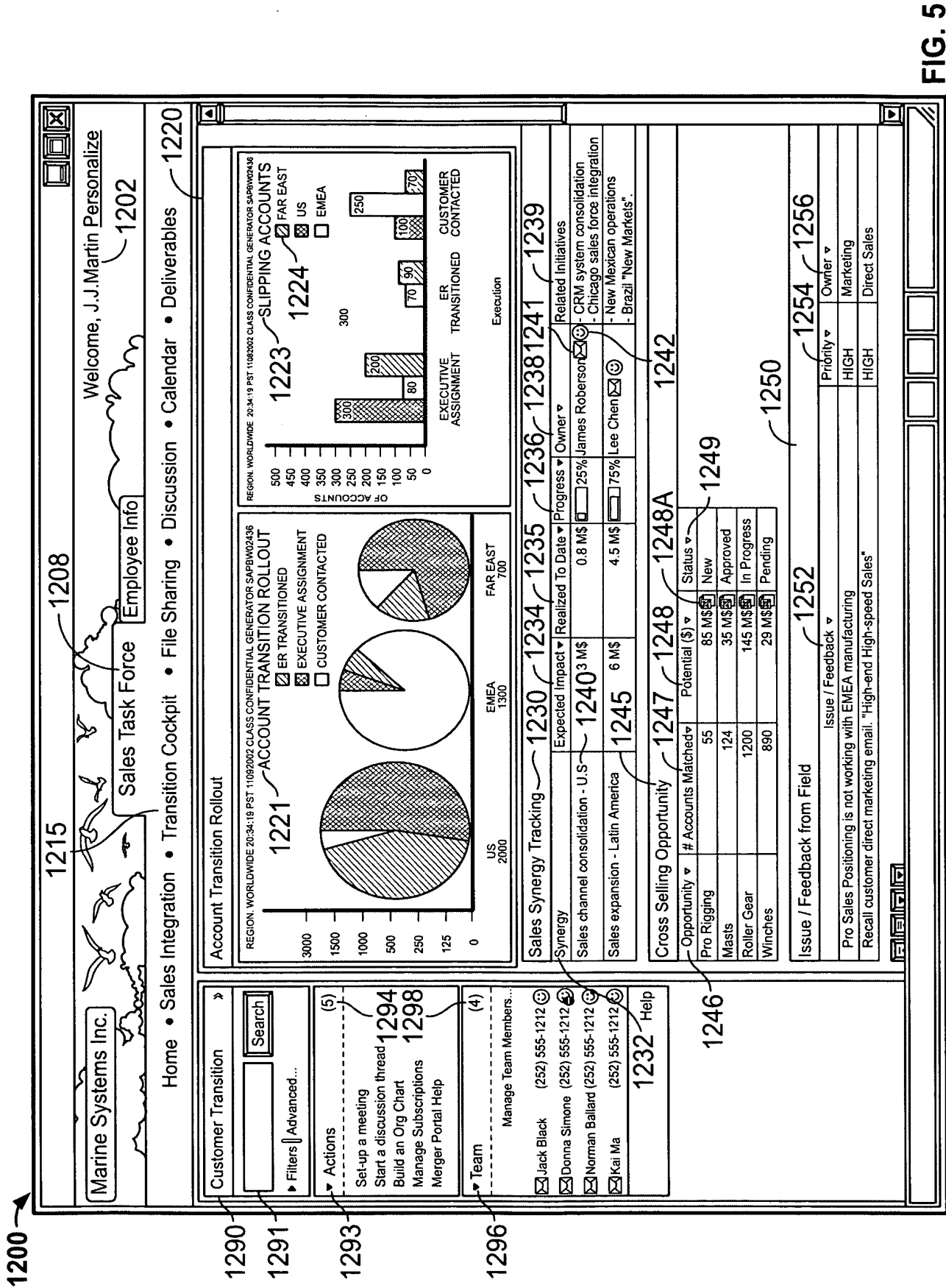


FIG. 4A





1200

1215 1208

Welcome, J.J. Martin Personalize 1202

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables

Marine Systems Inc. Sales Task Force Employee Info

Customer Transition »

Search

Filters Advanced...

Actions (6)

Set-up a meeting

Start a discussion thread

Build an Org Chart 1294

Manage Subscriptions

Merger Portal Help 1261

Team 1298 (4)

Manage Team Members...

Jack Black (252) 555-1212

Donna Simone (252) 555-1212

Norman Bollard (252) 555-1212

Kai Ma (252) 555-1212

Help

1281 1283

Pro Rigger 55 85 M\$ New

Masts 124 35 M\$ Approved

Roller Gear 1200 145 M\$ In Progress

Winches 890 29 M\$ Pending

Issue / Feedback from Field 1250 1252 1254 1256

Issue / Feedback

Priority Owner

Pro Sale Positioning is not working with EMEA manufacturing

Recall customer direct marketing email "High-end High-speed Sales"

1264 1265 1266 1267

Customers Impacted Impact \$ Owner

274 8 M\$ Ron Dekey

75 3 M\$ Ziv Udi

1273

Customer Retention 1270

Total 1272 U.S. EMEA Far East

75% (View survey results)

88% 90% 35%

80% (View survey results)

83% 80% 50%

Customer Watch List 1280

Remove Add New

Revenue (1 year)

Account Executives

Transition Status

Risk

Customer Boat Barn

1.8 M\$ Bruce Williams

Not Started

Newport Shipyards

2.0 M\$ George Clueless

Executive Assigned

West Marine

2.5 M\$ John Z. Dylan

Contacted

None

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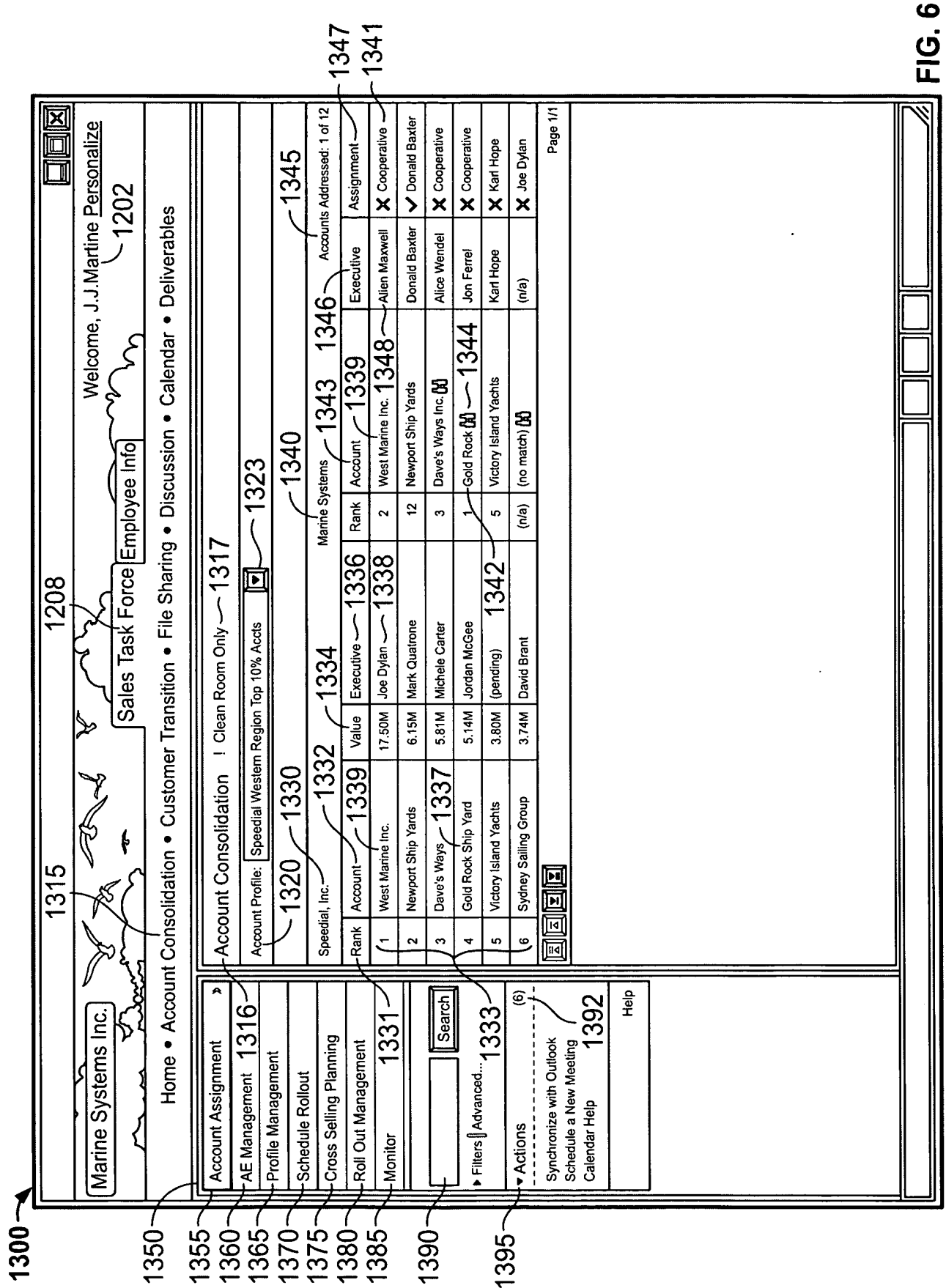
1290

1291

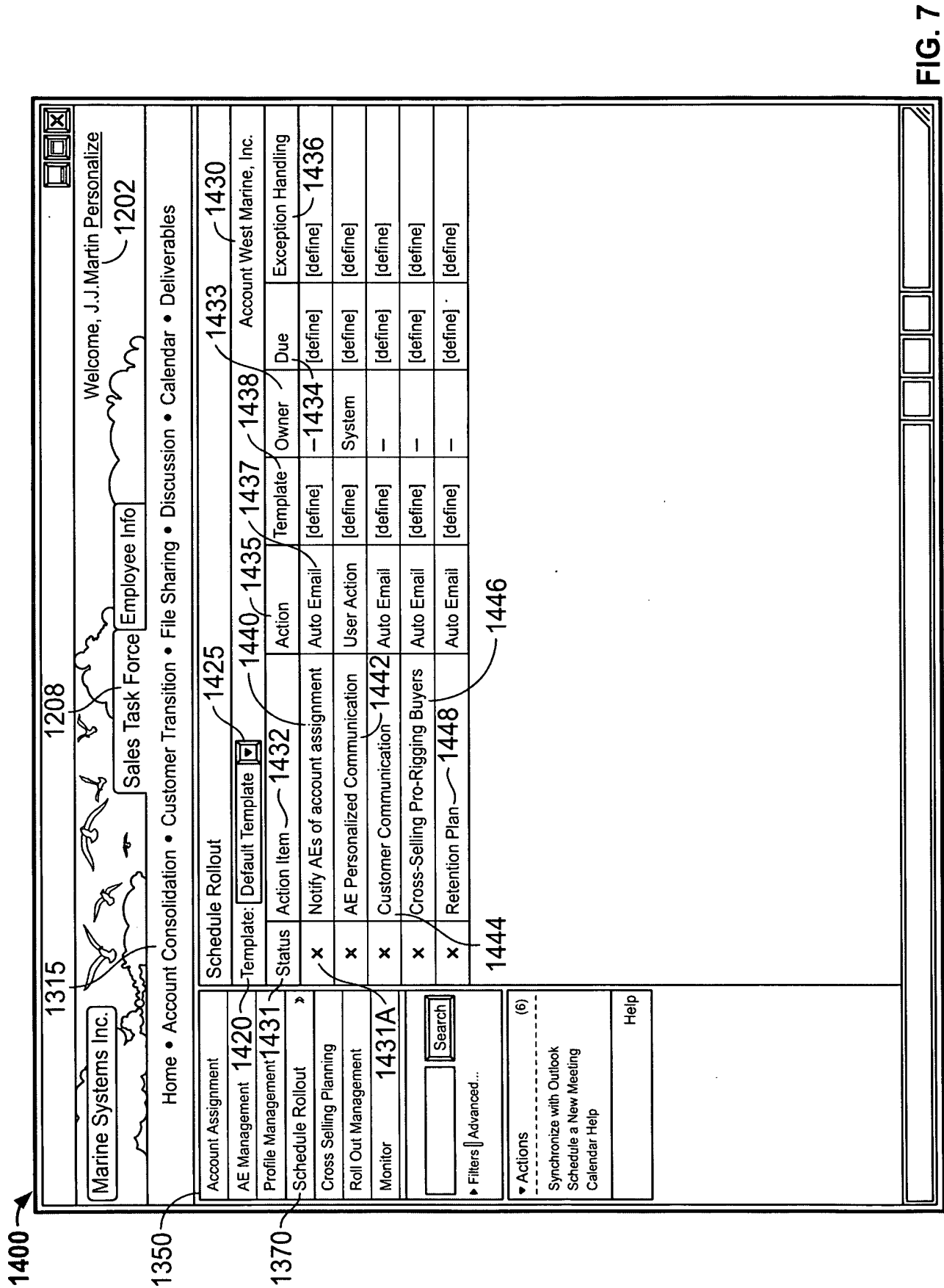
1293

1296

FIG. 5A







1500

1420 Schedule Rollout 1425

1431 Template: Default Template 1432 1440 1435 1437 1438 1433 1434 Account West Marine, Inc. 1430

Status	Action Item	Action	Template	Owner	Due	Exception Handling
x	Notify AEs of account assignment	Auto Email	[define]	—	[define]	[define] 1436
x	AE Personalized Communication	User Action	[define]	System	[define]	[define]
x	Customer Communication	Auto Email	[define]	—	[define]	[define]
x	Cross-Selling Pro-Rigging Buyers	Auto Email	[define]	—	[define]	[define]
x	Retention Plan 1448	Auto Email	[define]	—	[define]	[define]

1440 Notify AEs of Account Assignment

1450 1452

Save Cancel

1445 Notification Template: 1447

Standard Notification 1460

Dear Account Executives,  
Due to the acquisition of Marine Systems, we have consolidated client accounts which have counter-parts in both companies. The decision was made based on numerous factors.

1462 Send to: 1470 Listed AEs

1464 Trigger Date: Day 1 + 0 days

1466 Response Due: Day 1 + 3 days

1468 Exceptions: Alert me via Email 1472 1475

FIG. 8

1600

1605 Action Planning: Speedial Western Region Top 10% Accts

1620 Short Assimilation

1622 Add New Action Item Save Reference Model

1631 Status Action Item 1632 1640 Type Template 1635 1637 1638 1633 [due dates estimated based on deal roll-out]

Status	Action Item	Type	Template	Owner	Due	Exception Handling
x	Account consolidation & assignment	Auto Email	[define]	1634	Mar. 03, 2003	[define] 1636
x	AE Personalized Communication	User Action	[define]	System	Feb. 18, 2003	[define]
x	Customer Communication	Communication	[define]	-	Mar. 18, 2003	[define]
x	Cross-Sell Opportunities	Cross-Sell	[define]	-	Mar. 12, 2003	[define]
x	Retention Plan 1448	User Action	[define]	-	Mar. 20, 2003	[define]

1625 1629

1640 Account Consolidation & Assignment

1645 Notification Template: 1650 1652

1647 Standard Notification

1662 Send to: Listed AEs 1670

1664 Trigger Date: Day 1 + 0 days 1670

1667 Response Due: Day 1 + 3 days 1670

1668 Exceptions: Alert me via Email 1672 1675

1682 Accounts Addressed/Consolidated 1 of 12

1684 Go to Account Consolidation

FIG. 9

FIG. 10

1700 → Account Consolidation: Speedial Western Region Top 10% Accts ! Clean Room Only → 1317

Speedial, Inc. → 1330 Marine Systems → 1340 Accounts Addressed: 1 of 12

Rank	Account	Value	Executive	Rank	Account	Executive	Assignment
1	West Marine Inc. → 1339	17.50M	Joe Dylan → 1338	2	West Marine Inc. → 1339	Allen Maxwell → 1348	Cooperative → 1341
2	Newport Ship Yards	6.15M	Mark Quatrone	12	Newport Ship Yards	Donald Baxter	✓ Donald Baxter
3	Dave's Ways	5.81M	Michele Carter	3	Dave's Ways Inc. → 1340	Alice Wendel	Cooperative
4	Gold Rock Ship Yard	5.14M	Jordan McGee	1	Gold Rock → 1340	Jon Ferrel	Cooperative
5	Victory Island Yachts	3.80M	(pending)	5	Victory Islands Yachts	Karl Hope	Cooperative
6	Sydney Sailing Group	3.74M	David Brant	(n/a)	(no match) → 1340	(n/a)	Joe Dylan

1732 Account 1711 1712

1739 West Marine, Inc. → 1713

1710 DUNS: 843.2081.22 Customer Contact: Jones Ferguson → 1713

1720 1727 1725

1731 Decision Thread Account Details

1735 Current Assignment: Cooperative  
Select an executive as Account Executive [Lead]: You can also Assign Another Executive

1777 1338 → 1742 1330 → 1751 1348 → 1741 1340 → 1752

Joe Dylan → 1746 Assign as Lead → 1781

Tenure: 4 years → 1762 1764 1757

Account Impact on Income: 95% → 1779

Manager: Bob Jones → 1779

Account Impact on Income: 28% → 1783

Total Assigned Accounts:

Account	Value	Assignment
West Marine	17.5M	Cooperative
Boston Whaler	0.42M	Transition
Miami Performance	0.40M	Cooperative
Lido Yachts Sales	0.15M	No Conflict

1745 1755

1772 Comments: Add Comment → 1774

This one will be tricky. Joe has relationships with many of our top customers and I don't want to overwork him [Jonathan Frank → 1770]

Actually, Joe is actually very good friends with West Marine's CEO. Their families go sailing and they are College Buddies. We need to be balanced [Richard]

1776

Comments: Add Comment

This is not Allen's main account Plus, he has other more important accounts coming up [Jonathan Frank → 1783]

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1800

1815

Marine Systems Inc.

1208

Welcome, J.J. Martine Personalize

1202

Sales Task Force Employee Info

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables

1850

Action Planning

1620

Account Consolidation

1622

AE Management

1835

Cross Selling Planning

1830

Monitor

1857

Filters Advanced...

1852

Actions

1855

Add New Action

1857

Manage Templates

1857

Manage Profiles

1840

Team

1842

Manage Team Members...

1625

J.J. Martin (252) 555-1212

1627

Emma Besson (252) 555-1212

1627

Hari Ashvini (252) 555-1212

1627

Jeff Naka (252) 555-1212

1627

Help

1631

Action Item

1632

Account Consolidation & Assignment

1635

Auto Email

1637

User Action

1638

Communication

1639

Cross-Sell Opportunities

1640

Retention Plan

1641

Exception Handling

Status	Action Item	Type	Template	Owner	Due	Exception Handling
X	Account Consolidation & Assignment	Auto Email	[define]	—	Mar. 03, 2003	[define]
X	AE Personalized Communication	User Action	[define]	System	Feb. 18, 2003	[define]
X	Customer Communication	Communication	[define]	—	Mar. 18, 2003	[define]
X	Cross-Sell Opportunities	Cross-Sell	[define]	—	Mar. 12, 2003	[define]
X	Retention Plan	User Action	[define]	—	Mar. 20, 2003	[define]

FIG. 11

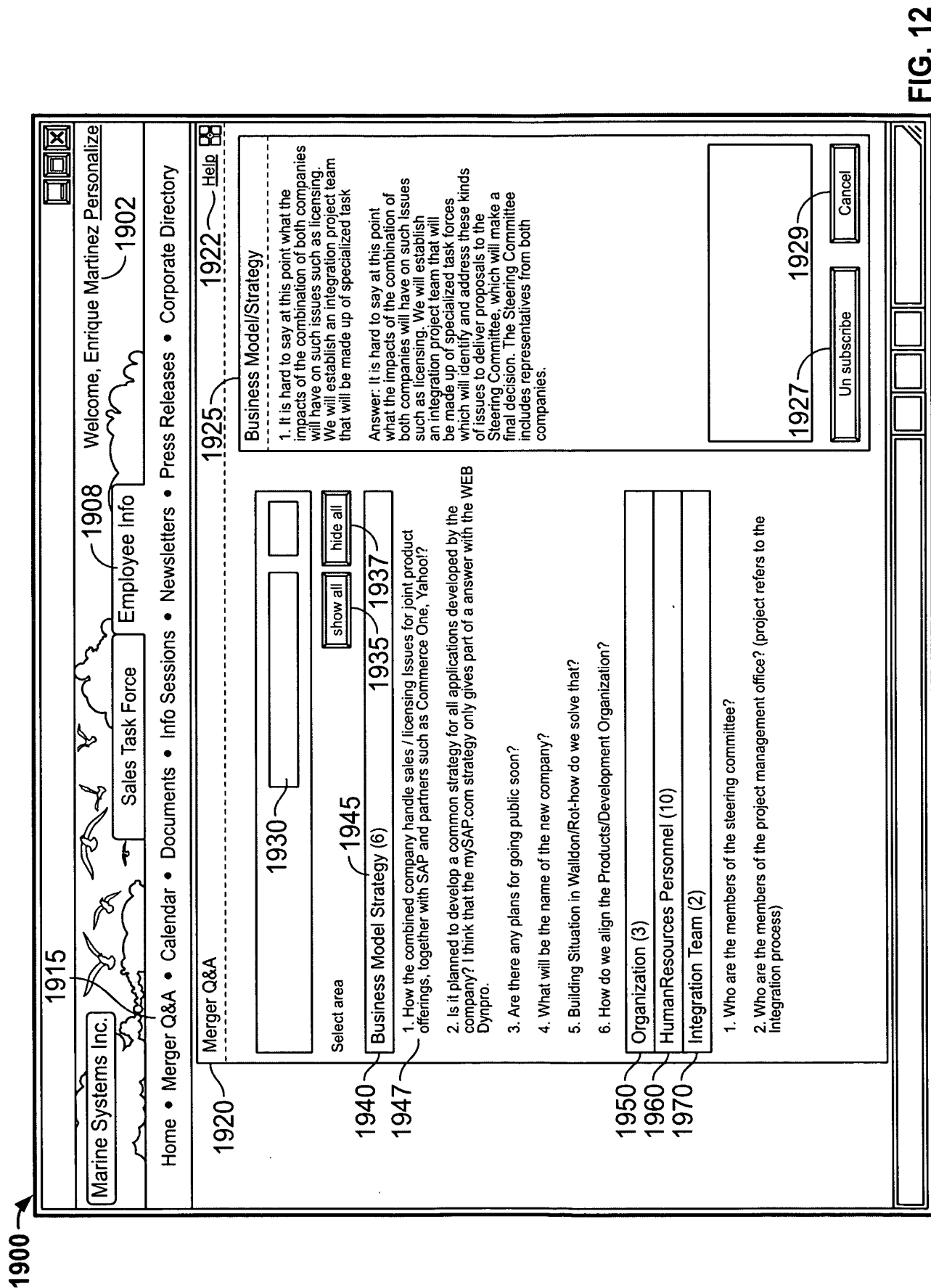


FIG. 12